



Billing, Waivers, Financial Aid and More

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SPROG DAY

Session Overview

- Accessing Info Online
- Financial Aid – Next Steps
- Renewing Financial Aid
- Parent Access to Student Information
- Billing, Payment and Insurance



SPROG DAY

Financial Aid Self Service

- Allows user to view status of financial aid
- View list of documents received/needed
- Accept/Decline/Change loans
- Report outside scholarships
- Print hard copy of financial aid letter
- Proxy access to parents, other persons
- Navigation/FAQ's can be found on Financial Aid page



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Financial Aid – Next Steps

■ Disbursement Dates

- Fall: August 16, 2024
- Spring: January 3, 2025

■ Merit Scholarships

- No additional steps needed

■ Verification

- List of required documents available on Self Service
- Priority deadline: June 14, 2024, but documents still accepted
- Must be completed before funds can be disbursed



SPROG DAY

Financial Aid – Next Steps

Tuition Equalization Grant

- Texas Residency Form - due June 24, 2024
- Form available on:
 - Self Service
 - Financial Aid website:
 - *Important Dates, Policies and Forms* → *Texas Residency Form*
- Upload completed form through Self Service

Pell Grant, Supplemental Grant, Southwestern Grant

- No additional steps needed, except for those selected for verification



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Financial Aid – Next Steps

■ Thank you notes

- Thank You note request email sent from *scholarships@southwestern.edu*
- For named scholarships/grants from SU
- Due date June 24, 2024

■ Truman J. Odiorne Scholarship

- Thank-you note
- Due date June 24, 2024



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Financial Aid – Next Steps

Accept, change, or decline loans

- Use Self Service to do this, go to My Awards, select the loan
- Accepting loans only indicates that you plan to use them
- Two more steps needed to complete loans (next slide)
- Only accepted loans will appear on billing statement
- Any changes to loan amounts will be reviewed

Complete by June 24, 2024



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Financial Aid – Next Steps

■ Direct Loans (Subsidized and Unsubsidized)

- Entrance Counseling
- Master Promissory Note
- Complete both at www.studentaid.gov

■ Direct PLUS Loan

- PLUS loan application
- Master Promissory Note
- Complete both at www.studentaid.gov

■ Complete by Jun 24, 2024



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Financial Aid – Next Steps

■ Private Loans

- Contact Lender for application information
- Private loan lender list available on Financial Aid Website
- Complete by June 24, 2024

■ Outside Scholarships

- Outside scholarships must be reported
- Required even if funds are sent directly to student
- Go to “Report/View Outside Awards” in Self Service to report these
- Complete by June 24, 2024



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Renewing Financial Aid

Satisfactory Academic Progress

- Applies to all financial aid (scholarships/grants/loans)
- 2.0 or higher cumulative GPA
- Complete 80% or more of all credits attempted
- Attempt no more than 175 credits
- Programs with additional requirements
 - Brown Scholarship: 3.5 cumulative GPA
 - Sarofim Scholar Awards/Fine Arts Performance Awards
 - TEG: 2.5 cumulative GPA/24 credits in AY/75% comp rate in AY



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Renewing Financial Aid

■ File FAFSA each year

- Required for renewing most financial aid, including loans
- FAFSA available in October 2024 (tentative)
- Due March 1 of each year
- Merit scholarship only: FAFSA not required
- Contact Financial Aid Office to discuss significant changes in family financial circumstances from year to year.



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FERPA and Proxy Access in Self-Service

■ FERPA:

Student must indicate with whom SU may discuss private financial and/or academic information

■ Proxy Access:

- Allows view-only access to Financial Aid information
- May be granted to parents or other persons
- Student must grant access
- Individuals granted access has own login credentials
- Instructions on the Self-Service Information page



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Self Service/Proxy Access Issues

- Once student grants proxy access, email will be sent to the proxy's email address
- Email will come from registrar@southwestern.edu
- Be sure email is not blocked or sent to spam folder
- Contact helpdesk@southwestern.edu with any issues



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Financial Aid Appointments

- Counselors available to meet with families
- Appointments available 1:00 pm – 4:00 pm today
- Link to make appointment sent to SU email account



Billing Information

X Menu

Apply Visit Majors & Minors

Becoming a Student

DIRECTORY

– Current Students

MYSOUTHWESTERN

Parents & Family

LIBRARY & IT

Faculty & Staff

STUDENT LIFE

Alumni

STUDY ABROAD

DEVELOP YOUR CAREER

ACADEMICS

ACADEMIC ADVISING

REGISTRAR & RECORDS

SAFETY & SECURITY

SCHOLARSHIPS/FINANCIAL AID

BILLING & PAYMENTS

PIRATE CARD

RESOURCES & TOOLS

ABOUT SOUTHWESTERN

ATHLETICS

CALENDAR

DIRECTORY

FINE ARTS

GIVING

LIBRARY & IT

NEWS



A Future Full of Promise

Southwestern University announces its 2021-2026 Tactical Plan.



G.H.O.S.T. Unit Takes Theater to New Dimensions at Southwestern

What happens when you start a devised theater project with three Southwestern University students and the Anton Checkov play, The Cherry Orchard? You end up with a nationally recognized production called G.H.O.S.T. Unit: The Live Event.



Southwestern University Announces Cassandra M. McZeal '92 as 2022 Commencement Speaker

The applied mathematician and Southwestern alumna will address the graduating class.



Southwestern University Student Honored as Newman Civic Fellow

Eugenia Agobe '23 recognized for commitment to solving public problems



Southwestern Students Receive Gilman International Scholarship to Study Abroad

Sierra Burton '22 and Suleman Khan '25 will use scholarship money to study in Europe and Japan.



Scholarship, Service, and Sisterhood

The Upsilon Alpha chapter of Alpha Kappa Alpha, Incorporated®, continues the rich legacy of the nation's first historically Black sorority.



Southwestern University Receives STARS Gold Rating for Sustainability Achievements

STARS, the Sustainability Tracking, Assessment & Rating System measures and encourages sustainability in all aspects of higher education.



SU has Earned 2021 Distinction Through the Tree Campus Higher Education Program for the Fifth Year in a Row

Southwestern University shows a dedication to including green spaces on campus as they have proven to benefit students.

STUDENT ACCOUNTS

Accessing Student Account Information

Understanding Your E-bill

Waivers for Optional Charges

Payment Options

Payment Plan

Setting up Authorized Payers

Student Account Refunds

Late Payment Policy

Payment Terms Agreement

Withdrawal Refund Policy

1098-T Form

Sprog Financial Aid & Billing Presentation - June 2023

2024-2025 Key Financial Dates and Deadlines

Billing Schedule & Due Dates

SEMESTER	E-BILL AVAILABILITY DATES	PAYMENT DUE DATE
Summer 2024	E-Bills released April 22, 2024	May 10, 2024
	Returning Students E-bills - April 26, 2024	
Fall 2024	Returning Students Reminder E-bills June 28, 2024	July 12, 2024
	New Students - E-Bill received after registration	
Spring 2025	E-bills released Nov. 15, 2024	Dec. 13, 2024



Fall 2024 Dates

At Sprog	Register for classes.
6/28/24	Fall 2024 E-bills Released in Transact Payments Portal.
7/11/24	All waivers due.
7/12/24	Fall 2024 Tuition Due or Enroll in Payment Plan.
7/22/24	\$100 Late Fee Assessed on Unpaid Balances.
Fall Move In	Balance must be paid or student is not allowed to move in & classes may be cancelled.



Spring 2025 Dates

11/15/24	Spring 2025 E-Bills Released in Transact Payments Portal.
12/12/24	Spring 2025 Vehicle Waiver Due.
12/13/24	Spring 2025 Tuition Due or Enroll in Payment Plan.
12/20/24	\$100 Late Fee Assessed on Unpaid Balances.
1/10/25	Students with unpaid Spring Balances must move out of housing & Spring classes will be cancelled.

Payment Options

■ Online via Transact Payments Portal

- Credit Cards – 2.85% processing fee (VISA, MasterCard, Discover, and American Express)
- Electronic Check/ACH - no fee at this time
- SU Payment Plan - \$25 enrollment fee
- International Payments – fees vary

■ By Mail

- Check, money order, or cashier's check

■ In Person at Business Office

- Cash, check, money order or cashier's check



Student's Self Service Account

UNIVERSITY

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

Notifications

Title	Details
View E-Bill and Make a Payment	Required
There are 4 requests from your institution that require your action.	

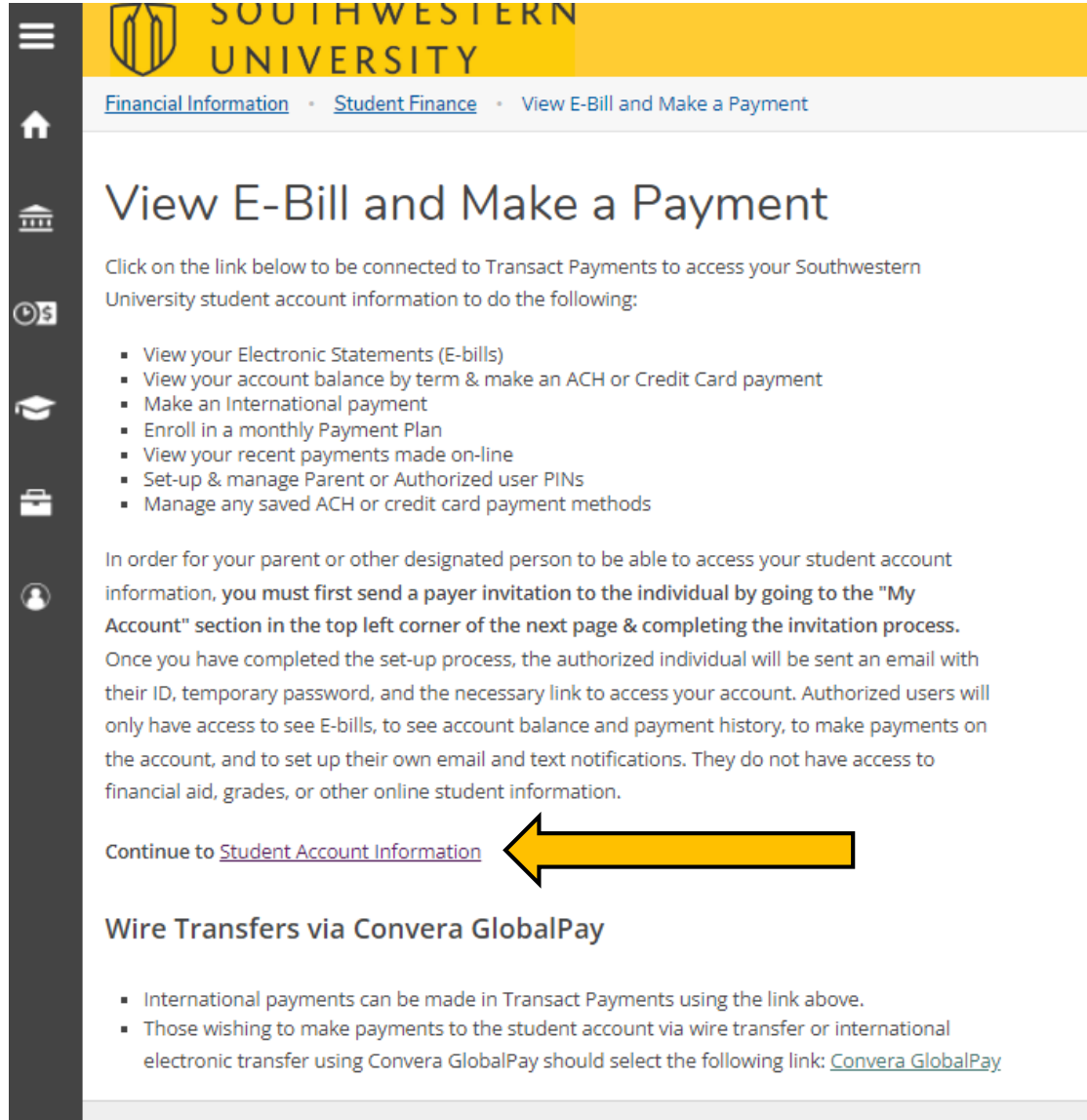
Student Finance
Here you can view your latest statement and make a payment online.

Financial Aid
Here you can access financial aid data, forms, etc.

Tax Information
Here you can change your consent for e-delivery of tax information.

Banking Information
Here you can view and update your banking information for payable payments (reimbursements, refunds, etc). For help contact us at brookss@southwestern.edu.

Continue To Access Transact Payments Portal



SOUTHWESTERN UNIVERSITY

[Financial Information](#) · [Student Finance](#) · [View E-Bill and Make a Payment](#)

View E-Bill and Make a Payment

Click on the link below to be connected to Transact Payments to access your Southwestern University student account information to do the following:

- View your Electronic Statements (E-bills)
- View your account balance by term & make an ACH or Credit Card payment
- Make an International payment
- Enroll in a monthly Payment Plan
- View your recent payments made on-line
- Set-up & manage Parent or Authorized user PINs
- Manage any saved ACH or credit card payment methods

In order for your parent or other designated person to be able to access your student account information, you must first send a payer invitation to the individual by going to the "My Account" section in the top left corner of the next page & completing the invitation process. Once you have completed the set-up process, the authorized individual will be sent an email with their ID, temporary password, and the necessary link to access your account. Authorized users will only have access to see E-bills, to see account balance and payment history, to make payments on the account, and to set up their own email and text notifications. They do not have access to financial aid, grades, or other online student information.

Continue to [Student Account Information](#)

Wire Transfers via Convera GlobalPay

- International payments can be made in Transact Payments using the link above.
- Those wishing to make payments to the student account via wire transfer or international electronic transfer using Convera GlobalPay should select the following link: [Convera GlobalPay](#).

Transact Payments Portal

Overview



Student Name

Southwestern University

Balance

\$17,236

Summary

[View statements](#)

(Fall 2024)

\$17,236.00


Balance


\$17,236.00


Recent transactions


[View all](#)


Date	Description	Receipt	Amount
5/6/20	Refund 20_FA: SU Fall 2020 Payment Plan	#60315	(\$25.00)
5/5/20	20_FA: SU Fall 2020 Payment Plan	#60297	\$25.00
12/11/19	Payment reversal 20_SP: SU Spring 2020 Payment Plan	#56948	(\$25.00)


 My Account


 **Overview**

 Payment Plans

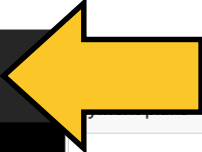
 Make a Payment

 Transactions

 Statements

 Help

 Sign Out



Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)


[View](#)

Recent transactions

[View all](#)

Date	Description	Receipt	Amount
4/10/23	23_SP: 23 Spring Special Payment Plan A	#87072	\$1,063.59
3/10/23	23_SP: 23 Spring Special Payment Plan A	#86354	\$1,063.58

[Make a payment](#)

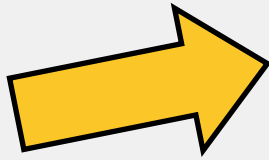


Do you want help paying?

Do you know someone that would like to help you pay? Invite them to have access to your account!

[Send a payer invitation](#)

Student must “Send a payer invitation” in order to allow parents or other authorized users access to the Transact Payments Portal. This is separate from Self Service Proxy.




Student Name

Southwestern University

Basic information


Name	Student Name
Student ID	250XXXX

Payment methods

Parents Checking (*****3439)	
+ Add payment method	

Payers

Do you know someone that would like to help you pay? Invite them to have access to your account!

Authorized User's Name	
+ Send a payer invitation	

Contact information

Email address	Student@southwestern.edu
Phone number	512-818-1234
Mailing address	123 Pirate's Cove Georgetown, TX 78626

SMS notifications

512-818-1234	
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Privacy & terms



Payer Invitation

Payer information

* First name

* Last name

* Email address

* Confirm email address

Payer access

Allow access to statements

Message to payer

Maximum 250 characters

Cancel

Send invitation

After the student sends the invitation, the “Payer” will receive an email with log on information and a link to the Payer Transact Payments Portal.



User name ⓘ

Password

Sign in

[Forgot password](#)
[Pay as a guest](#)

Welcome to the Southwestern University Student Accounts on-line services page. From here you can do the following:

1. Access your student account e-bill
2. Make payments on-line using credit cards and electronic ACH transfers
3. Enroll in or manage a payment plan.

Students - Your log-in "User ID" is your SU ID Number.

Parents must use the following web address to make payments online at: <https://commerce.cashnet.com/swupay>

Overview



Parent

Southwestern University

Balance

\$24,225

Student: Student Name

[View a different student](#)

If you have more than one student currently enrolled, parents can link the accounts together. Each student needs to invite the payer. When you have successfully logged in to one student, you should see the “View a different student link”



Current student



Student Name

View



Link to another student at Southwestern University

You'll be able to easily switch between students without having to sign out and sign back in.



Link to another student



Student link

You will login with the information for your other student. Can use temporary password if you were just invited.

Link to another student

Enter the user name and password that you use to sign into another student's account at Southwestern University.

*** User name**

 *User name required*

*** Password**

 *Password required*

Cancel

Continue

Viewing E-Bills/Statements

Overview



Student Name

Southwestern University

Balance

\$17,236

Summary

[View statements](#)

(Fall 2024)

\$17,236.00

Balance




\$17,236.00

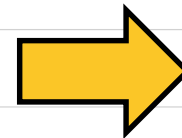
Recent transactions

[View all](#)

Date	Description	Receipt	Amount
5/6/20	Refund 20_FA: SU Fall 2020 Payment Plan	#60315	(\$25.00)
5/5/20	20_FA: SU Fall 2020 Payment Plan	#60297	\$25.00
12/11/19	Payment reversal 20_SP: SU Spring 2020 Payment Plan	#56948	(\$25.00)

Statements

Date	Description	View	Save
5/6/24	SWU Bill • NEW		
4/11/18	SWU Bill		
3/20/18	SWU Bill		
3/8/18	SWU Bill		
1/10/14	SWU Bill		
1/10/14	SWU Bill		
12/18/13	SWU Bill		
12/18/13	SWU Bill		



Sample Fall 2024 E- bill/ Statement



1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name _____
1234 Pirate Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/12/24
Student ID:	██████████
Due Date:	07/12/24
TOTAL AMOUNT DUE:	\$17,536.00

PAYMENT OPTIONS:	
In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line –	Students use "Make a Payment" link on Web. Parents go to https://commerce.cashnet.com log on using their account information sent to their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION
Fall balances are due July 12. Waivers are due July 11. Visit <https://www.southwestern.edu/business-office/student-accounts-for-optional-charges/> for more information. Visit <https://www.southwestern.edu/black-and-gold-advantage/> for more information about Black & Gold Advantage.

**Full-time Tuition
(12-19 credits)
is \$26,644
Lab Fees = \$75**

NOTE – Student must accept offered financial aid in self-service before it will appear on the e-bill.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/24	24/FA Tuition	\$26,644.00	
07/01/24	24/FA Housing	\$4,138.00	
07/01/24	24/FA Unlimited Meals/Week	\$3,323.00	
07/01/24	\$75 Pirate Bucks	\$75.00	
07/01/24	24/FA Student Service & It Fee	\$163.00	
07/01/24	24/FA Vehicle Registration	\$120.00	
07/01/24	2024-25 Dewar Tui Ins Plan	\$555.00	
07/01/24	2024-25 Student Health Insuran	\$2,468.00	
07/01/24	24/FA Orientation Fee	\$200.00	
07/01/24	Deposit Allocation		-\$250.00
07/01/24	Deposit Allocation		-\$200.00
07/01/24	Ant 24/FA Black & Gold Advanta	\$300.00	

Subtotal: **\$37,536.00**

CONFIRMED FINANCIAL AID	
Cody Scholar Award	\$17,500.00
Southwestern Grant	\$2,500.00

Confirmed Financial Aid: **\$20,000.00**
AMOUNT DUE **\$17,536.00**

Financial Aid Needing Attention Example



1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Pirate Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/12/24
Student ID:	[REDACTED]
Due Date:	07/12/24
TOTAL AMOUNT DUE:	\$17,536.00

PAYMENT OPTIONS:	
In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line –	Students use "Make a Payment" link on WebAdvisor. Parents go to https://commerce.cashnet.com/swupay & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION
Fall balances are due July 12. Waivers are due July 11. Visit https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/ for more information. Visit https://www.southwestern.edu/black-and-gold-advantage/ for more information about Black & Gold Advantage.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/24	24/FA Tuition	\$26,844.00	
07/01/24	24/FA Housing	\$4,138.00	
07/01/24	24/FA Unlimited Meals/Week	\$3,323.00	
07/01/24	\$75 Pirate Bucks	\$75.00	
07/01/24	24/FA Student Service & It Fee	\$163.00	
07/01/24	24/FA Vehicle Registration	\$120.00	
07/01/24	2024-25 Dewar Tui Ins Plan	\$555.00	
07/01/24	2024-25 Student Health Insuran	\$2,468.00	
07/01/24	24/FA Orientation Fee	\$200.00	
07/01/24	Deposit Allocation		-\$250.00
07/01/24	Deposit Allocation		-\$200.00
07/01/24	Ant 24/FA Black & Gold Advanta	\$300.00	

Subtotal: \$37,536.00

CONFIRMED FINANCIAL AID	
Cody Scholar Award	\$17,500.00
Southwestern Grant	\$2,500.00

Confirmed Financial Aid: \$20,000.00

AMOUNT DUE \$17,536.00

NOTE – ACTION IS NEEDED to move items from “Needing Attention” Section to “Confirmed Aid” Section.

FINANCIAL AID NEEDING ATTENTION	
Federal Direct Unsubsidized Loa	\$2,721.00
Fed Direct PLUS Loan	\$9,578.00

FINANCIAL AID NEEDING ATTENTION: \$12,299.00

Sample E-bill with Verification

Southwestern University

ENGAGING MINDS. TRANSFORMING LIVES.

1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/12/24
Student ID:	
Due Date:	07/12/24
TOTAL AMOUNT DUE:	\$17,536.00

PAYMENT OPTIONS:

In Person – At Business Office, located on first floor of Cullen Building
By Mail – P. O. Box 770, Georgetown, TX, 78627
 (include Student ID number on check)
On-line – Students use "Make a Payment" link on WebAdvisor.
 Parents go to <https://commerce.cashnet.com/swupay> & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION

Full balances are due July 12. Waivers are due July 11. Visit <https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/> for more information. Visit <https://www.southwestern.edu/black-and-gold-advantage/> for more information about Black & Gold Advantage.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/24	24/FA Tuition	\$26,644.00	
07/01/24	24/FA Housing	\$4,138.00	
07/01/24	24/FA Unlimited Meals/Week	\$3,323.00	
07/01/24	\$75 Pirate Bucks	\$75.00	
07/01/24	24/FA Student Service & It Fee	\$163.00	
07/01/24	24/FA Vehicle Registration	\$120.00	
07/01/24	2024-25 Dewar Tui Ins Plan	\$555.00	
07/01/24	2024-25 Student Health Insuran	\$2,468.00	
07/01/24	24/FA Orientation Fee	\$200.00	
07/01/24	Deposit Allocation		-\$250.00
07/01/24	Deposit Allocation		-\$200.00
07/01/24	Ant 24/FA Black & Gold Advanta	\$300.00	

Subtotal: \$37,536.00

CONFIRMED FINANCIAL AID

Cody Scholar Award	\$17,500.00
Southwestern Grant	\$2,500.00

Confirmed Financial Aid: \$20,000.00

AMOUNT DUE \$17,536.00

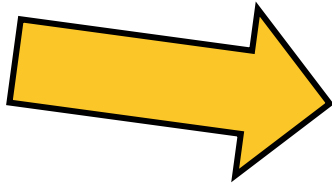
FINANCIAL AID NEEDING ATTENTION

Some of your financial aid is subject to verification and therefore may not appear on this statement. Contact the Financial Aid Office at 512-863-1259 or at fnald@southwestern.edu for more information

FINANCIAL AID NEEDING ATTENTION:

\$0.00

NOTE – If your Financial Aid is still in verification, federal aid will NOT appear on the e-bill, but this message will appear.



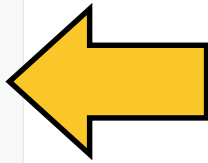
Transact Payments Portal - Making a Payment










Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)



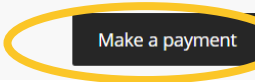
 SOUTHWESTERN UNIVERSITY

-  Student Name
-  **Overview**
-  **Make a Payment**
-  Transactions
-  Statements
-  Sign Out

Recent transactions

[View all](#)

Date	Description	Receipt	Amount
4/2/20	20_SP: SU Spring 2020 Payment Plan	#59819	\$500.53
3/1/20	20_SP: SU Spring 2020 Payment Plan	#59144	\$1,433.87
2/1/20	(Summer III 2020)	#58408	\$200.00



Make a payment



Make a Payment

Step 1 of 3: Pay amount



i Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)



How much would you like to pay?

Balance items

Uncheck all | 1 of 1 selected

Description	Balance	Amount
<input checked="" type="checkbox"/> (Fall 2024)	\$17,536.00	<input type="text" value="\$17,536.00"/> <input type="button" value="x"/> <input type="button" value="v"/>
<i>Maximum \$17,536</i>		
Total balance		\$17,536.00
Pay amount		\$17,536.00
<i>Remaining balance</i>		<i>\$0.00</i>

* Indicates required field



Payment 1 item

\$17,536

Cancel

Checkout



Make a Payment

i **Need to enroll in a payment plan?**
Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.
[View payment plan options](#)

How would you like to pay?

Payment amount

\$17,536

*** Payment method**

- New credit or debit card
- New bank account
- International payment
Bank Transfer or Credit Card

SU Payment Plan

- The SU Payment plan is located in Transact Payments Portal (Parents/payers need authorization to log into Parent Portal).
- Each semester requires enrolling in a new payment plan.
- \$25 nonrefundable enrollment fee per semester.
- No interest charged and no credit check.
- Payment plan is tied to the student account balance due (actual balance on the student account less any confirmed financial aid).



FALL PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
June 14	5	June 15, July 15, Aug 15, Sept 15, Oct 15
July 14	4	July 15, Aug 15, Sept 15, Oct 15
August 14	3	Aug 15, Sept 15, Oct 15

SPRING PAYMENT PLANS

Enrollment Deadline	# of Monthly Payments	Payment Due Dates
December 14	5	Dec 15, Jan 15, Feb 15, Mar 15, Apr 15
January 14	4	Jan 15, Feb 15, Mar 15, Apr 15
February 14	3	Feb 15, Mar 15, Apr 15



SU Payment Plan

- The payment plan total will automatically adjust if the student account balance changes, resulting in future monthly payment(s) also changing.
- If the payment plan has to be cancelled for nonpayment, there is a \$100 cancellation fee and the student account balance will become due immediately.
- Please contact Student Accounts FIRST if there is more than one person paying on a student's account.



Payment Plans



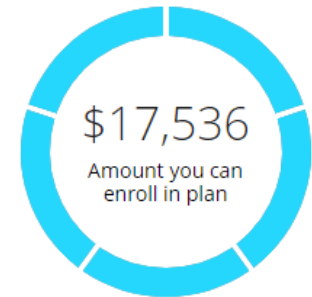
Need to enroll in a payment plan?

Enrolling in a payment plan takes just a few minutes and can help you spread out payments on your education expenses.

[View payment plan options](#)

24_FA

24 Fall Payment Plan



5 payments | \$25 enrollment fee

Payment Schedule

- 1 \$3,507.20
Payment due 6/15/24
- 2 \$3,507.20
Payment due 7/15/24
- 3 \$3,507.20
Payment due 8/15/24
- 4 \$3,507.20
Payment due 9/15/24
- 5 \$3,507.20
Payment due 10/15/24

Cancel

Enroll in plan



Step 1 of 4: Agreement



\$17,536

You've opted to enroll this amount in 24_FA: 24 Fall Payment Plan

Review the payment schedule and terms and conditions below.

Payment Schedule

1	\$3,507.20	Payment due 6/15/24
2	\$3,507.20	Payment due 7/15/24
3	\$3,507.20	Payment due 8/15/24
4	\$3,507.20	Payment due 9/15/24
5	\$3,507.20	Payment due 10/15/24

Terms and Conditions

Please read below and indicate your agreement to be bound by these terms and conditions by selecting the checkbox below.

Southwestern University
Payment Plan Agreement Terms & Conditions

By enrolling in the Southwestern University Monthly Payment Plan (payment plan), I agree to the following terms and conditions:

As a student enrolled in classes at Southwestern University, I agree to assume full financial responsibility for all charges incurred on my student account whether I attend the classes or not. I further understand that my failure to be financially responsible may result in campus holds, late fees, collection actions by Southwestern University and

9. Communication:

- a. Southwestern University uses email as an official method of communication; therefore, students are responsible for reading their emails from Southwestern University on a timely basis.
- b. It is the student's responsibility to keep Southwestern University records up to date with their current physical address, email addresses, and phone numbers. Refer to the Registrar webpage for instructions on how to update this information.
- c. I have read the Terms and Conditions of this agreement and I authorize Southwestern University and their respective agents to contact me regarding my student account and any other financial obligation to Southwestern University at the current or any future number that I provide for my cellular or other wireless device using automated telephone dialing equipment, artificial, or pre-recorded voice or text messages.

I have read and agree to the SU Payment Plan terms and conditions presented.

Cancel

Continue

How would you like to pay?

Enrollment fee amount

\$25

* Payment method

[Change](#)

New bank account



Important: Payments can be made from personal checking or savings accounts only. Corporate accounts are not allowed.

* Account holder name

ⓘ Account holder name required

* Account type

- Checking
 Savings

* Routing transit number ⓘ

* Bank account number ⓘ

* Confirm bank account number

Bank account nickname ⓘ

My bank account

Maximum 17 characters

Bank account terms and conditions

By checking the box below, you authorize Southwestern University to withdraw payment for the amount indicated from your account. You represent you have the authority to withdraw funds from the deposit account selected. Because this is an electronic transaction (also called an ACH transaction), the payment funds may be withdrawn from your account on the payment date. You also understand and further authorize that if your ACH payment is returned due to inaccurate account information or insufficient

I agree

Set up auto pay with the same payment method

Auto pay terms and conditions

By enrolling in the Southwestern University Installment Payment Plan (payment plan) Auto Pay, I agree to the following terms and conditions:

Automated Direct Payment:

- Payment may be automatically set up to be deducted from your checking or savings account by e-check, debit or credit card.
- A non-refundable convenience fee of 2.75% is assessed for all credit card transactions. Effective July 5th the transaction fee is increasing to 2.85%. There will be a minimum fee of \$3 for transactions over \$20 and less than \$106. There is no fee for ACH payments at this time, but this could change.
- Payments will be withdrawn from your account on the 10th day of each month and

The Auto pay box is automatically checked. If you do not want to pay with same method, uncheck box.

Don't forget

Auto Payments

Cancel

Continue

Credit/Debit Card transactions have a 2.85% fee.

Service fee

This site is owned and operated by Transact Campus, Inc. If you choose to make a payment by using Transact Campus SmartPay, you will be charged a service fee for each payment as shown below. This charge is assessed by Transact Campus, Inc. Service fees are included in your transaction and are paid directly to Transact Campus, Inc. Service fees are non-refundable.

Amount due now

24_FA: 24 Fall Payment Plan	
Enrollment fee	\$25.00
Service fee	\$3.00
Total	\$28.00

Payment Schedule

- 1 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 6/15/24 | Payment due 6/15/24
- 2 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 7/15/24 | Payment due 7/15/24
- 3 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 8/15/24 | Payment due 8/15/24
- 4 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 9/15/24 | Payment due 9/15/24
- 5 $\$3,507.20 + \$99.96 \text{ service fee} = \$3,607.16$
Payment scheduled 10/15/24 | Payment due 10/15/24

I acknowledge that I have read and accept the terms and conditions of the Transact Campus, Inc. user agreement and I understand that my transaction includes a non-refundable service fee for each payment for the use of Transact Campus SmartPay. [View terms and conditions](#)

1001 E. University Ave.
Georgetown, TX 78626
512-863-1928
studentaccounts@southwestern.edu

Student Name
1234 Lookout Cove
Georgetown, TX 78626

PAYMENT SUMMARY	
Statement Date:	07/03/24
Student ID:	XXX
Due Date:	07/12/24
TOTAL AMOUNT DUE:	\$13,788.80

PAYMENT OPTIONS:	
In Person –	At Business Office, located on first floor of Cullen Building
By Mail –	P.O. Box 770, Georgetown, TX 78627 (include Student ID number on check)
On-line –	Students use "Make a Payment" link on WebAdvisor. Parents go to https://commerce.cashnet.com/swupay & log on using their account information sent to them by their student.

If you are mailing a payment, include the top portion. Keep the lower portion for your records.

IMPORTANT INFORMATION
Fall balances are due July 12. Waivers are due July 11. Visit <https://www.southwestern.edu/business-office/student-accounts/waivers-for-optional-charges/> for more information. Visit <https://www.southwestern.edu/black-and-gold-advantage/> for more information about Black & Gold Advantage.

DATE	STATEMENT ACTIVITY	CHARGES	CREDITS
07/01/24	*** Balance Forward ***		-\$3,447.20
07/01/24	24/FA Tuition	\$26,644.00	
07/01/24	24/FA Housing	\$4,138.00	
07/01/24	24/FA Unlimited Meals/Week	\$3,323.00	
07/01/24	\$75 Pirate Bucks	\$75.00	
07/01/24	24/FA Student Service & It Fee	\$163.00	
07/01/24	24/FA Vehicle Registration	\$120.00	
07/01/24	2024-25 Dewar Tui Ins Plan	\$555.00	
07/01/24	2024-25 Student Health Insuran	\$2,488.00	
07/01/24	24/FA Orientation Fee	\$200.00	
07/01/24	Deposit Allocation		-\$250.00
07/01/24	Deposit Allocation		-\$200.00

Subtotal: \$33,788.80

CONFIRMED FINANCIAL AID	
Cody Scholar Award	\$17,500.00
Southwestern Grant	\$2,500.00

Confirmed Financial Aid: \$20,000.00

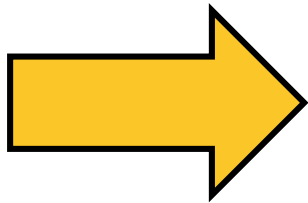
AMOUNT DUE \$13,788.80

PAYMENT PLAN INFORMATION

Term	Payment Plan	Due Date	Installment Amount
24_FA	24 Fall Special Payment Plan A	6/15/2024 12:00:00 AM	\$0.00
24_FA	24 Fall Special Payment Plan A	7/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	8/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	9/15/2024 12:00:00 AM	\$3,447.20
24_FA	24 Fall Special Payment Plan A	10/15/2024 12:00:00 AM	\$3,447.20

Payment Plan Amount Due \$13,788.80

Sample
E-bill
with
Payment
Plan





July 11, 2024 – last day to waive ALL 3 optional charges!

3 Optional Charges/Waivers

STUDENT ACCOUNTS

Key Dates and Deadlines

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Student Account Refunds

Late Payment Policy

Payment Terms Agreement

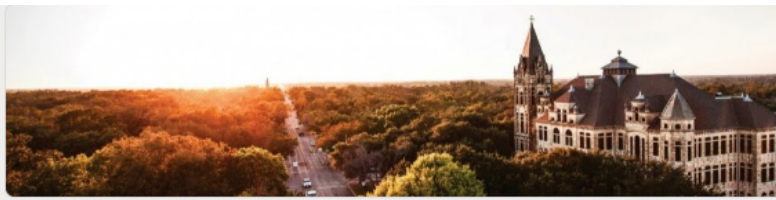
Withdrawal Refund Policy

1098-T Form

WAIVER TYPE	AMOUNT OF CHARGE 2024-2025	WAIVER SITE OPENS	WAIVER SITE CLOSES
Vehicle Registration NOTE - Can only be done by students since it requires log in through student email	\$120 each semester	Fall 5/1/2024	Fall 7/11/2024 Spring 1/10/2025
Dewar Tuition Refund Plan IMPORTANT - Policy coverage is 75% for both injury and illness withdrawals & mental health withdrawals	\$555 2024-25 academic year	5/1/2024	7/11/2024 11/1/2024
Student Health Insurance	TBD New SU Students for Spring 2025	11/1/2024	1/10/2025

The vehicle waiver form must be completed by the student. It requires log in through the SU student email.

The fine for parking on campus without a parking decal is \$125 per violation.



Southwestern University Police Department Parking Permit Waiver

The Southwestern University student handbook specifically states under section XII - Traffic and Parking Regulations that all owners and/or operators of motor vehicles must observe the requirement of registering said motor vehicles on forms provided during the regular registration period. The annual \$240 parking fee is billed separately as \$120 in the Fall semester and \$120 in the Spring semester.

All students are automatically charged a vehicle registration fee of \$120 each semester. If a student does not park a vehicle on campus, the charge may be waived by completing this online waiver form. This waiver must be completed prior to the deadline for each semester individually and only applies to the indicated semester. If a vehicle is brought to campus after this waiver process is completed, the required fee of \$120 must be paid for that semester, and the owner/operator must register the vehicle at the University Police Office within two days after arrival on campus.

By completing this online form you are certifying that you will not be parking a motor vehicle on Southwestern University property for this semester. Those individuals who have been found, through police intervention, to be parking motor vehicles on University property in violation of the above stated policy will be subject to administrative disciplinary action to include a fine and/or loss of all driving and parking privileges on University property. Any violation of the above stated policy will be subject to administrative disciplinary action to include a fine and/or loss of all driving and parking privileges on University property for the remainder of the given semester. The fine for not having a parking decal is \$125.

Southwestern University Student Handbook

"A student who enrolls at Southwestern University voluntarily becomes part of a community where respect for others is the norm. Rational, mature, honest behavior is expected. This voluntary entrance into the community implies acceptance by the student of University regulations. Any form of dishonesty is a violation of personal integrity and is unworthy of an academic community. One example of such dishonesty is as follows: "Supplying false information to the University."

moores@southwestern.edu [Switch account](#)

Will you ever potentially park a car on campus? *

- Yes
- No
- Maybe

Southwestern University Police Department Parking Permit Waiver

moores@southwestern.edu [Switch account](#)

Your email will be recorded when you submit this form

* Indicates required question

Vehicle Waiver

Semester *

Fall 2024

Certification of Vehicle Registration Waiver

On this date *

Date

mm/dd/yyyy

I do hereby affirm that I will not be operating a motor vehicle on University property for the semester indicated above. I further affirm that if I decide to operate a motor vehicle on University property, I will contact the University Police Department within two days to purchase and receive my vehicle parking permit. I further understand that by completing this waiver, I am requesting the Business Office to process my \$120 waiver to my student account. *

I acknowledge

Back

Next

Clear form



Dewar Tuition Refund Plan

- Third party insurance designed to protect the financial investment of students and parents by providing up to 75% refund of tuition, on-campus housing & meals AFTER SU's standard refund policy is applied when a student withdraws for medical reasons (includes mental health).
- \$555 Dewar Tuition Refund Plan Annual Charge for 2024-25. Covers both Fall & Spring semesters.
- Southwestern does not keep any of the premium.
- Automatically charged to all student accounts annually on the Fall bills.
- Can waive tuition refund charge by completing on-line waiver form at Dewar website before July 11, 2024.



Dewar Tuition Refund Plan

- Claims require a Medical Form completed by a doctor.
- Benefit payments are made directly to Southwestern to settle the student's account. Any remaining credit on the account will be refunded to the student.
- Amount of coverage can be adjusted (i.e., only insure cost less financial aid). Call or email Student Accounts for details.

Dewar Tuition Refund Plan

Dewar provides up to a 75% refund of covered term tuition and on campus housing and meals when a student withdraws for medical reasons.

Tuition Refund Example:

If the Medical Withdrawal Occurs:	University Refunds:	Dewar Refunds:	Student Receives:
During first full week of classes	80%	0%	80%
During second full week of classes	60%	15%	75%
During third full week of classes	50%	25%	75%
During fourth full week of classes	40%	35%	75%
During fifth full week of classes	30%	45%	75%
After the fifth full week of classes	0%	75%	75%

Coverage Details

About Dewar

Waiver Form

The deadline for waiving is:
July 11, 2024

Don't let an unforeseen illness or accident prevent you from completing your education.

Every year thousands of college students are forced to withdraw from classes due to sickness or injury. The accompanying loss of tuition payments can undermine a family's educational budget.

For more than 80 years, the Dewar Tuition Refund Plan has assisted students to continue their education by providing refund benefits when illnesses or injuries prevented them from completing a term.

Please note that all students are automatically enrolled in this insurance program and will be billed for the premium charge unless a waiver of benefits is completed.

To request a change in the amount of coverage provided, do not complete this waiver. Contact the Southwestern University Business Office directly at 512-863-1928 or studentaccounts@southwestern.edu

Those who wish to waive the coverage, please complete the waiver form on this page. By submitting this form, you are waiving your entitlement to any coverage offered by the Tuition Refund Plan and you will not be responsible for the cost to participate.

Student Information

First

Middle

Last

Student ID

Re-enter Student ID

E-mail address

I wish to waive participation in the Tuition Refund Plan offered by Dewar.

All information provided is strictly confidential and used solely for waiver of the Tuition Refund Plan.

Submit



Student Health Insurance

- All full time students are required to have health insurance as a condition of enrollment at SU. If you do not have your own, SU provides a health insurance option.
- Premium is automatically charged to all student accounts annually on the Fall bills.
- Premium for 2024-25 is \$2,468.
- Southwestern does not keep any of the insurance premium.
- 12 month coverage period of 8/10/2024 to 8/9/2025.
- Insurance policy is portable.



EIIA Early Enrollment & On-line Waiver Process

- Early Enrollment - helps ensure access to the medical ID card when the policy begins in August.
- To waive coverage - Required to input your primary insurance information related to your personal/family health plan that is covering the student. Waiver site closes July 11, 2024.
- Your personal insurance plan must provide coverage locally in the SU area.



**NOTE –
Turning in your
Health Insurance
Card and
information to
SU Health Center
or SU Athletics
DOES NOT Meet
this waiver
requirement.**

Southwestern University

Your institution is concerned with your health and well-being. Student insurance is an important part of your studies. Please take advantage of the information available and review the Full Plan Document for coverage details. If you have questions, please contact us at 888.255.4029.

Waiver and Enrollment

Enrollment and waiver forms for the 2023-24 academic year will be open on 05/01/23 at 12:00 AM and close on 07/13/23 at 11:59 PM. Make sure that you either waive coverage or enroll in Southwestern University's insurance program to ensure that you have adequate insurance coverage while in attendance. If you have any questions, please do not hesitate to contact us at 888.255.4029.

ENROLL OR WAIVE

SU ATHLETES ONLY - ENROLL IN INDIVIDUAL PRIMARY SPORTS PLAN



SOUTHWESTERN UNIVERSITY

BLACK & GOLD ADVANTAGE

The Black & Gold Advantage program makes getting your course materials more convenient and affordable.

- Receive all your course materials before the first day of class
- Save 35-50% on the cost of course materials each term
- Benefit from a highly personalized service

How it Works



REGISTER FOR CLASSES

Upon registering for courses, you will be automatically enrolled into the program.



VERIFY YOUR ORDER

Starting 30 days before the first day of classes, you will receive an email to verify your order and select your fulfillment preference.



RECEIVE YOUR TEXTBOOKS

An email notification will be sent when your order is ready for pickup or when it ships. Your digital materials will be delivered for your course(s) within Moodle.



Southwestern Black & Gold Advantage

- \$25 per credit. Full time minimum charge of \$300
- Opt out period starts August 12
- After 12th class day account will be adjusted for actual enrolled credits.

Guaranteed Tuition Plan (TX Tomorrow) or other State Prepaid Plan (Florida, Mississippi, etc.)

- Notify Student Accounts at studentaccounts@southwestern.edu if you have a Texas Guaranteed Tuition Plan (TX Tomorrow) or another state's prepaid plan.
- TX Tomorrow – Provide a copy of your ID Card in the email.
- Southwestern charges a flat tuition rate for 12-19 credit hours. We will give you a credit for 12 hours (the least amount) and will adjust your account for the actual hours after the add/drop date.

Using a 529 Plan

- Contact your 529 plan to initiate the withdrawal.
- Provide mailing address for Southwestern & your student ID number
- They will then mail a payment to Southwestern. Please keep in mind that this can take several business days to process before the payment is mailed
- Once requested, please notify Student Accounts at studentaccounts@southwestern.edu so we can be on lookout for payment

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1098-T Form

STUDENT ACCOUNTS

Student Account Refunds

Contact	Student Accounts	Email studentaccounts@southwestern.edu	Phone 512.863.1928
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STUDENT ACCOUNT REFUND REQUEST FORM

PIRATE BUCKS TRANSFER FORM

Pirate Bucks can also be used for SU Bookstore online purchases

BOOKSTORE VOUCHER/TRANSFER FORM

Transfer funds to a SU Bookstore voucher for use in the store (not for online purchases). Any unused balance will be transferred back to your Student Account.

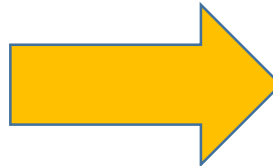
DIRECT DEPOSIT ENROLLMENT INSTRUCTIONS

General Student Refund Information:

Refunds can not be requested until the first class day of the semester.

Refunds cannot be processed until all charges have been paid and all financial aid has been disbursed.

All forms must be completed by the student.



Final Reminders

- Students - Check your SU email on a regular basis!
- Students - Invite your parents to the Transact Payments portal so they can receive the E-bill & make payments. There are 2 invitations necessary. Proxy & Transact portal
- July 11, 2024 - Waivers are due .
- July 12, 2024 - Tuition due or enroll in a payment plan.
- Students will be able to move into on-campus housing if:
 - Account is paid in full, or
 - Enrolled in a SU Payment Plan, or
 - Financial Aid is Confirmed.



Contact Information

■ Financial Aid

- Email: finaid@southwestern.edu
- Phone: 512-863-1259

■ Student Accounts

- Email: studentaccounts@southwestern.edu
- Phone: 512-863-1928 or 512-863-1927